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ABSTRACT

The W. K. Kellogg Middle Start Initiative is a comprehensive educational reform effort to foster school improvement efforts and build public support for middle-grades reform in Michigan. Begun in 1993-1994, Middle State has to date involved more than 220 schools, including those that have received grants for comprehensive school improvement (CSI) and focused grants to improve reading and mathematics. The Academy for Educational Development has been conducting the documentation and cluster evaluation of the Middle Start Initiative since its beginning in spring 1994. This study examined the progress of 12 schools receiving CSI grants as part of their involvement in Middle Start. The case studies were designed to capture the pathways adopted by the schools over time to evolve into middle-grades schools that promoted academic achievement, healthy development, and social equity. The study included interviews with CSI principals, interviews with CSI teacher teams, classroom observations in CSI schools, review of annual reports of CSI schools and technical assistance partners, site observations, documentation of network meetings, and data from evaluation forms at networking conferences. Findings show that schools obtained the best student outcomes when they developed an integrated focus on varied aspects of middle-school reform. Technical assistance partners played key roles in guiding the integration of time, expertise, and partnerships. Six schools led in the comprehensive and integrated nature of their reforms. Four schools demonstrated moderate progress for students, and two schools struggled to meet their Middle Start goals and showed lower levels of outcomes for students. (SLD)

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W. K. KELLOGG FOUNDATION MIDDLE START INITIATIVE

Cluster Evaluation Report, 1997-98

Working Paper # 4

Progress of the Middle Start Comprehensive School Improvement Schools

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Cluster Evaluation Report, 1997-98

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Progress of the Middle Start Comprehensive School Improvement Schools

Academy for Educational Development

New York, NY

December 1998

Table of Contents

Introduction 1

Overview of Evaluation Findings 2
Summary of Evaluation Findings 4

Chapter One: School Reorganization 7

Changes in Scheduling 7
Time for Professional Development 10
Houses and/or Learning Centers 11

Chapter Two: Expertise 13

The Content and Use of Professional Development 13
Role of Leadership 19
Comprehensiveness and Integration of Reform Efforts 23

Chapter Three: Partnerships 25

Within-School Partnerships 25
Cross-School Partnerships 28

Chapter Four: Technical Assistance 33

Technical Assistance in Schools and Networks 34
Technical Assistance Partnerships 37
Schools' Views of Technical Assistance 38

Chapter Five: Conclusion 40

Retrospective Overview 40
Lessons Learned 44
Issues for Further Consideration 46

Introduction

The W.K. Kellogg Middle Start Initiative is a comprehensive educational reform effort to foster school improvement efforts and build public support for middle-grades reform in Michigan. Middle Start strategies designed to attain this goal have included an extensive public awareness and engagement effort, opportunities for school self-assessment, grants to schools, technical assistance and support, and networking of schools and other partners in the initiative. Begun in 1993-94, Middle Start has to date involved over 220 schools, including schools that have received grants for comprehensive school improvement (CSI) and "focused" grants to improve reading and mathematics.

Since summer 1995, 12 schools have received CSI grants to support comprehensive efforts to improve teaching and learning, particularly for the most vulnerable students. These efforts were to address reform in 10 dimensions: curriculum, instruction, student assessment, professional development, program evaluation, school organization, school climate, communications, family involvement, and school-community partnerships. Each CSI school worked with a technical assistance (TA) partner in its reform efforts; The cadre of TA partners, including experts in the field of middle-grades education in Michigan, was coordinated by the Academy for Educational Development. In addition, schools had access to assistance from the Center for Prevention Research and Development (CPRD) of the University of Illinois in the use of the School Self-Study and from the Kellogg Foundation consultant in the development of communication plans.

The Academy for Educational Development (AED) has been conducting the documentation and cluster evaluation of the Middle Start Initiative since its beginning in spring 1994. The purpose of this documentation is to record and assess the progress of the initiative in its efforts to increase awareness and understanding among stakeholders throughout Michigan regarding the specific needs of middle-grades students and their schools; encourage policies and practices to address these needs; and support specific local efforts in schools and communities. The cluster evaluation is not an evaluation of each grantee's work but rather an examination of the progress of the initiative.

This report describes the progress of 12 schools receiving CSI grants as part of their involvement in Middle Start. This year's case-studies on the progress of the CSI schools were

designed to capture the pathways adopted by schools over time to evolve into middle-grades schools that promoted academic achievement, healthy development, and social equity. At the time of the data collection for this report, seven schools had participated in the CSI grant program for over three years; four had participated for at least two years; and the newest CSI schools had been in the program less than a year.

AED approached this year's study design as a culmination study of four years of effort and achievement in Middle Start Phase I. The design thus included a study of the 10 dimensions of Middle Start, the highlights and difficulties experienced with becoming a comprehensive, integrated school, and the lessons learned by each stakeholder regarding the connections between doing reform and attaining social and academic outcomes for middle-grade students. In studying the initiative's impact on structures within schools and on the content of schooling, the design paid attention to strategies of institutionalization of new knowledge and skills, sustainability promoted by networking, and by diversification of leadership within schools.

The study design included the following data collection strategies and sources: interviews with CSI principals; interviews with CSI teacher teams; classroom observations in CSI schools; review of annual reports of CSI schools and TA partners; interviews with participants and TA partners in regional networks; site observations and TA documentation of meetings of regional networks; and site observations and data from evaluation forms of the networking conferences.

Overview of Evaluation Findings

*If you have the **time** and **expertise**, you are not reinventing the wheel and tripping over yourself.* [teacher in a Comprehensive School Improvement (CSI) grantee school]

*The **partnerships** built are a powerful piece of Middle Start.* [principal, CSI school]

These three elements—time, expertise, and partnerships—are key factors that enabled CSI schools to provide nurturing environments for young adolescents and foster increased achievement for varied groups of students.

In this context, "time" refers to the kinds of changes in school reorganization that fostered improved teaching and learning. CSI schools reworked their schedule to allow longer blocks of learning time for students, common planning time for teacher teams, and regular meetings of Middle Start task forces and school improvement committees. They also restructured grade-

levels into houses or learning centers to foster team spirit and a sense of belonging. "Expertise" refers to the related professional development and leadership development, the implementation of new knowledge and skills, and problem-solving on relevant issues with within-school and cross-school partners. Ongoing staff development in instructional and curricular areas, as well as the social and psychological aspects of early adolescence were priorities in CSI schools. School leadership was enhanced as administrators worked closely with Middle Start TA partners, became involved in cross-school networks, and gained increased access to high-quality resource materials on middle-grades education.

"Time,"and "expertise" served Middle Start schools best when they received joint attention. In the case of common planning time (CPT), for example, schools reworking the schedule to accommodate CPT greatly benefitted from also building their expertise on how best to use this time. Strategies aiding the implementation of innovations like CPT included inter-visitations with other implementing schools; researching a topic in teacher and/or administrator task forces; consultations with TA partners and other outside experts; and intensive grade-level pilot programs.

The above example leads to the third aspect—partnership—that was crucial to the reform efforts of CSI schools. Within-school and cross-school partnerships were central to Middle Start activities in CSI schools. Within-school collaborations involved teaching and non-teaching staff, administrators, parents, school/district resource personnel, and the Middle Start TA partner. The strongest Middle Start schools demonstrated highly collaborative relationships and a sense of ownership of the reform process among all stakeholders, especially staff. In many cases staff buy-in was nurtured by the increased availability of time for professional development, joint planning, and participation in decision making with administrators and TA partners. Cross-school partnerships solidified among groups of CSI schools toward the end of the first phase. The Southwestern Michigan network (four CSI school principals and a TA partner) and the Rural Schools Consortium (TA partners, staff and/or administrators of four other CSI schools) held monthly meetings for members to exchange information, solve problems, and address issues of mutual interest such as inclusion, cooperative learning, and teaming.

Summary of Evaluation Findings

Schools attained the best student outcomes when they developed an integrated focus for their work on varied aspects of middle-grades reform. TA partners played key roles in guiding the integration of the three factors—time, expertise, and partnerships—into coherent plans of action within schools. Six schools led the group of 12 in the comprehensive and integrated nature of their reform efforts (referred to in this report as Group One schools).* Four schools demonstrated moderate progress for students, although they had several organizational, instructional, and collaborative elements in place (Group Two). Two schools, primarily as a result of staff and administrator turnover, struggled to meet their Middle Start goals, and showed lower levels of outcomes for students (Group Three).

This section contains a brief summary of evaluation findings for both students and the CSI schools as a whole.

Outcomes for students were as follows:

1. Middle Start helped students become more engaged in their education by offering them a wider range of curricular, instructional, and assessment opportunities.

2. Middle Start fostered a greater sense of belonging and safety in school among students through better staff-student-parent relationships.

Both kinds of outcomes were present (and intertwined) in all schools. In many cases, better relationships between students and teachers were preceded by focused attention on staff collaboration and cooperation. A "sense of belonging" was fostered by better interactions among staff and between staff and students, and by greater parent participation in school events. This in turn ensured a safer school environment. Staff collaboration also led to instructional and curricular innovation. Schools with high levels of staff collaboration successfully implemented school-wide teaming, used team CPT efficiently, and applied new instructional and curricular knowledge in a supportive environment. In such schools, students made significant academic

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* "Comprehensiveness" in this context means adherence to the 10 dimensions of Middle Start; "integration" means coordination of these 10 dimensions; and "alignment"—another category used to study CSI schools' reform efforts—means alignment of these dimensions with district guidelines.

gains. They were engaged in new learning opportunities that targeted their strengths and involved peers, parents and community members. From a review of data collected by AED, Group One schools demonstrated encouraging social and academic outcomes for students. Group Two schools demonstrated positive relationships between students and teachers, and were developing teacher expertise in providing varied learning opportunities for students. Group Three schools were simultaneously experiencing collaboration and conflict, as a result of changes in leadership that caused discontinuities in their Middle Start efforts. Students in these schools were disadvantaged by administrative and organizational issues that dominated the 1997-98 school year.

Outcomes for CSI schools. Last year's cluster evaluation report of the CSI schools concluded that, while schools had made notable improvement efforts, "reorganization tended to focus more on structural aspects of the new middle school, such as scheduling, teaming, and learning communities, than on the reform of curriculum and instruction." This year's findings indicate that schools were more comprehensive in their areas of reform, including both structural and content aspects in their reform efforts. They also went about their reform efforts in a more integrated manner than in previous years. Integration, especially in Group One schools, meant increasing levels of coordination in the implementation of structural, instructional, and curricular aspects of reform, so that efforts were no longer piecemeal, but increasingly complementary. Other areas in which schools made progress are partnership and networking; staff and administrator expertise in middle-grades reform; and the overall effectiveness of a middle grades design. The experiences of Group One schools show the importance of leadership development, and the key roles played by administrators and teacher leaders in schools' reform efforts. These findings are discussed below.

- **Schools were more comprehensive in their areas of reform** relative to previous years. Traditionally difficult areas of reform such as revitalizing curriculum, institutionalizing new instructional practices, involving family and community in academic and social aspects of schooling, and involving staff in decision-making were focal areas of effort and achievement in more than half the schools.

- **Schools were more integrated in their reform efforts** relative to previous years. The structures established over the last few years enabled schools to incorporate new knowledge and skills gained through professional development, technical assistance, partnerships and networking in a cohesive manner. School administrators, teacher

leaders, and especially technical assistance partners were crucial to integration, as they led the development of a working vision for schools.

- **Levels of partnership and networking were unprecedented** compared to previous years of Middle Start. Several CSI schools developed strong bonds with each other via regional and statewide networking meetings. Technical assistance partners also formed a cohesive group that shared experiences and innovations.

- The **leading group of CSI schools expressed great confidence in the expertise of staff and administrators** to continue to influence reform in their own schools, schools within their network, their district and in other parts of the state. Administrators consulted with district officials on their experiences with middle school reform, staff conducted professional development in instructional and curricular areas at other schools, and schools accepted the responsibility of being "demonstration sites" for comprehensive middle-grades reform within the state.

- The **importance of comprehensive, integrated school improvement and webs of school networks to improved teaching and learning** and fostering student achievement and healthy development was proved by the safe, high-achieving, engaging environments observed in the best Middle Start schools. The credibility of the benefits of a middle school design was enhanced in schools, school districts and (to an extent) in the state by the progress demonstrated by these schools over a relatively short period of time.

- The **key roles played by administrators and teacher leaders**, and the **great need for ongoing leadership development**, through technical assistance, professional development, and networking, was demonstrated by the slower progress and greater difficulties experienced in a few CSI schools that faced turnover and retirement of key staff and administrators. This was a finding reflected in last year's cluster evaluation as well. Leadership development needs greater emphasis in Phase II of Middle Start, perhaps in a similar fashion to the focus on technical assistance and professional development in Phase I (this is discussed further in the concluding section titled "Lessons learned").

The remainder of this paper contains five chapters. Chapter one discusses the issue of "time," under the broader label of school reorganization. Chapter two describes gains in expertise among staff and administrators. Chapter three focuses on the partnerships that evolved within and among schools. Chapter four describes the work of technical assistance partners in promoting effective reorganization, professional development, and collaboration in CSI schools. Chapter five provides an overview of CSI schools over the last four years and describes several

areas requiring attention. The appendix contain an update on Middle Start activities in focused grant schools.

Chapter One

School Reorganization

This chapter describes the major changes in school reorganization—in scheduling, more time for professional development, and restructuring of grades levels into houses or learning centers—that had an impact on time in many CSI schools. All Group One and some Group Two schools made significant advances in these areas. These innovations promoted staff collaboration and expertise, improved relationships among staff and students and provided students with more time to learn and complete assignments. Group One schools attained most or all of the above features by the end of Phase I of Middle Start (summer 1998). In many schools, the benefits of school reorganization were directly related to social and developmental outcomes for students such as improved student-teacher relationships and safer learning environments. Several principals and teachers noted that these were first steps in improving academic achievement. Immediate academic outcomes were increased time and opportunity for active learning projects, and for completion of assignments with the assistance of teachers. These changes are described below.

Changes in Scheduling

Several Group One and Group Two schools implemented a) teaming and common planning time and b) block learning time to provide teachers with time to collaborate with team members, and students with time to engage in long-term thematic projects.

Teaming and common planning time. Principals, teachers, and TA partners alike stressed the contribution of teacher teaming to the progress made by Middle Start schools. They also emphasized the extensive time, effort and expertise needed to build and sustain strong teams. All Group One and several Group Two schools increasingly planned their schedule around CPT for teachers. The following are some responses on teaming from varied groups of stakeholders:

> Staff are far more collaborative in their planning and decision making. It has been a source of teacher support. (*TA partner report*)

> Students have a sense of belonging to their teacher teams. They know they have someone to go to. Parents feel that they have help from their children's teachers." *(Group One principal interview)*

> Sometimes its hard to get through to some students. It helps to be able to talk about this to teachers from the other content areas. If a student connects with one of us better than the others, we can reach him or her through that person." *(Group One teacher interview)*

Strategies learned from other teachers on the team, cooperation in ensuring completion of student work, and support from colleagues in discipline issues are the highlights of teaming, according to teachers. Teaming and CPT increased teachers' opportunity to communicate with parents and gather student input on courses of action to complete assignments and change behavior, as the following examples demonstrate:

> An eighth grader seated across from her four teachers in a classroom in a Group One school, for example, received praise for completing her assignments in language arts, and was encouraged that she could shortly complete what was due in science and social studies. The math teacher took the opportunity to say, "I would like to be able to congratulate you on completing all your assignments too." Another teacher backed him up, "He has your best interests at heart. You are a bright girl, capable of wonderful work. You know we're there for you." The student had been called in to meet the eighth-grade team because of deteriorating grades, non-completion of assignments, and "acting-up," especially with the math teacher. She entered the room saying "This is weird, I don't want to be here." The student expressed her feelings about "being misunderstood" by the math teacher. He clarified his reasons for correcting her behavior. At the end of the discussion, which lasted 20 minutes, they arranged that she stay after school and complete her assignments with any teacher she chose to work with.

> The team briefly met with a student and his parent next. The student had missed several classes and was behind with his work in all the content areas. His mother was non-committal about his absences, saying she needed him at home sometimes to take care of younger siblings. She did not respond to their concerns that it was her legal obligation to send him to school. Later, a teacher explained that the student's mother had responded to the team's request to meet with her after many attempts. "We spend a lot of time calling parents regarding what they need to work on with their kids," she said. *(Observations and discussions during site visit)*

Teaming was always more effective when accompanied by common planning time. All Group One and some Group Two schools allotted at least one period of CPT per week. Some

Group One schools had scheduled CPT into the daily schedule. Teacher teams felt this time enabled them to work together to ensure completion of student work in all content areas, and resolve discipline issues in a united manner. Teams rarely had time left over from the above activities to plan interdisciplinary or team-taught units. Principals and staff from schools that had teaming with CPT were enthusiastic about their combined benefits.

Block learning time. Few schools reported successful use of block-learning time. Even teachers in the most innovative Group One schools felt "it was too much time to keep students engaged on a regular basis." However, they appreciated the flexibility it gave them when they planned active-learning units and special projects.

A number of Group One schools reorganized a portion of their daily schedule into "blocks" of learning time.

> A seventh-grade schedule in one school, for example, was divided into two content area blocks of 100 minutes each, an exploratory block of 80 minutes, a regular length period of 45 minutes (which teachers used to "catch students up"), and lunch and advisory of 30 minutes each. Students in a seventh-grade language arts class in a Group One school benefitted from the hour and a half block they had to write a paper on the death penalty. They used the time in a variety of ways. Some students used the time to continue writing their first draft. Other students got teacher feedback on their work, after which they worked on their final draft. Still others who had completed both drafts printed their papers at the computer lab. The class worked in relative silence. Students who completed all parts of the assignment socialized at the far end of the room without disturbing those at work. The teacher encouraged questions and provided feedback. The stretch of time allowed students to revisit their arguments from previous weeks, and reread articles they had gathered. *(Observations and discussions during site visit)*
>
> In another classroom of the same school, the teacher and students had a different experience with block learning time. Students who completed the assignment were restless. Some of them did not want to "read quietly" as the teacher requested. "It gives them more time to waste," the teacher said. The principal explained that when the school piloted blocks of time with one team, 25 percent had supported it and 75 percent had been unconvinced about its effectiveness. He felt that 90 percent of his staff now supported longer blocks of time. "Block learning time will not work if you are a 'in-your-seat-straight rows-lecture-type' person," he said; "we implemented block schoolwide only after everyone was trained in cooperative learning, brain research and mastery learning." *(Observations and discussions during site visit)*

Time for Professional Development

All 12 schools identified the need for professional development to expand teachers' expertise in areas suggested by their school improvement plans. They therefore allowed generous amounts of time for professional development, recognizing that without time there is little expertise gained. With varying levels of success, they wrestled with obstacles like shortages of substitute teachers, parents' concerns about teachers being "out of the classroom," and competitiveness among teachers to participate in professional development activities.

Through trial and error, Group One schools arrived at a systematic schedule of implementation. In discussions and interviews, several Group One principals noted that "follow-up is crucial," in applying new knowledge and skills in the classroom. Their schools established a self-sustaining cycle of staff participation in professional development activities, shared new knowledge and skills with the whole staff applied new concepts in a supportive setting, resolved difficulties in implementation, and sought greater levels of expertise as the concepts and practices became internalized in the school. The following example demonstrates the process by which this internalization occurred in a Group Two school:

> The principal of the Group Two school, working with the Middle Start committee, opened up several professional development opportunities to staff. A special education teacher and a math teacher researched an idea for an inclusion project, including cooperative learning and teacher teaming. They attended a cooperative learning training workshop with the rest of the staff, tried some of what they learned in their classrooms the following week, presented the results of their trial at a staff meeting, and invited other teachers to try it, offering themselves as resources. The planning team allowed for training time, in-class trials, and follow-up reporting to the whole staff. Based on the success of the initial idea, and staff responses to the presentation, they planned a full-fledged inclusion pilot for the fall. *(Observations and discussions during site visit)*

Group One schools scheduled meetings for teachers to present and discuss new knowledge and skills. Some formats adopted included whole-staff retreats, half-day inservices, after-school meetings of teams, and/or whole staff, out-of-town conferences, inter-visitations with other schools, and monthly networking meetings. Group One schools adopted several of the above formats of professional development. They demonstrated greater continuities in professional development themes; for example, a Group One school adopting CPT consulted and

solved problems with the assistance of the TA partner and an external expert at several stages of implementation until the innovation "took root" on a schoolwide basis.

Teachers in three Group One schools served as professional developers in areas such as cooperative learning, special education inclusion, and technology in education. Their schools are recognized within Middle Start and their school districts as "demonstration sites" for successful innovation in select areas.

> In one instance, a Group One school provided release time for a group of teachers to conduct an inservice on cooperative learning in a Group Two school. *(Group One teacher interview)*

> In another instance, teachers from two Group One schools visited each other to observe instructional strategies relating to technology in education. *(TA partner report)*

Administrators supported these exchanges by sanctioning release time and arranging substitutes. TA partners were instrumental in arranging such exchanges as well.

Houses and/or Learning Centers

Several Group One and some Group Two schools organized their grade levels into houses or small learning centers to foster a sense of belonging on the part of students. Many such units adopted themes (usually selected by students) in order to foster a group identity. The following examples illustrate the types of themes seen in house structures.

> The seventh-grade house of a Group Two school had a bee theme. Classrooms were decorated with posters reading "bee industrious" and "bee polite." The team of four teachers wore pins or earrings with a bee motif. Folders and notebooks bore bee logos. *(Observations from site visit)*

> In another school, grade-level teams adapted a Planet Hollywood theme. The principal described an incentive system linked to this theme: "Teachers put up the names of students on a bulletin board and call them "stars of the week." They have a "wall of fame." *(Group One principal interview)*

> Another grade-level in this school ran a "courtyard cafe." Study tables were set up cafe-style, surrounded by plants and student art. Students were involved in choosing the theme and decorating the area. The principal said, "It gives them a comfortable, homey feeling." *(Observations from site visit)*

A similar restructuring strategy that aimed for a heightened sense of belonging is "teacher progression" or "looping" where students stay with the same teacher through all the middle grades. In an interview, the principal of a school with looping reported that participating teachers favored this arrangement because they did not need to break the ice with their students each year. She also felt that most students in her school found it reassuring. One constraint to implementation was resistance on the part of teachers from the higher grades to teach at lower grade levels.

Changes in scheduling, increased time for professional development, and thematic houses were major aspects of school reorganization in several Middle Start schools. These innovations enhanced staff collaboration and opportunities to gain expertise, fostered a sense of belonging in students, and gave students more time to learn and complete assignments.

Chapter Two

Expertise

This chapter discusses the content and use of professional development in CSI schools, as well as the role of leadership in their reform efforts. It also discusses the degree of comprehensiveness and integration of these efforts.

Group One schools gained expertise in varied aspects of curriculum, instruction, and school reorganization. Staff, administrators, parents and students participated in varied learning opportunities. Shared staff development experiences enhanced teacher collaboration and innovation in the classroom. In addition, administrators gained access to new resources and information; their close collaboration with TA partners augmented their leadership skills. Schools involved parents in workshops and circulated information on early adolescence within communities. As a result, students engaged in more active-learning opportunities including service-learning, thematic learning, and technology in education. They had responsive teachers and other adults to turn to in conflict and need. Group One schools demonstrated comprehensive expertise and integrated implementation of reform. They developed effective problem-solving strategies to overcome difficulties in implementation.

The Content and Use of Professional Development

Staff development topics chosen by CSI schools fell into three broad and somewhat overlapping categories: curricular interventions, instructional strategies, and responsiveness to the developmental phase of middle-grades students. Staff from most CSI schools received training in all three categories. Some Group One schools attained high levels of expertise in some or all of the above areas. As noted in the previous chapter, staff from these schools not only participated in professional development conducted by outside experts, but also served as professional developers themselves. In general, TA partners noted an overall improvement in the range of instructional techniques, curricular units, and assessment strategies; they also reported improvements in teacher-student interactions. The three areas of staff development are discussed below.

Curricular interventions. Several Group One and Group Two schools demonstrated the use of engaging curricular strategies in all content areas. Two other curricular areas that received attention in some Group One and Group Two schools were technology in education and service-learning. Instructional strategies like cooperative learning were usefully combined with hands-on learning activities in the main content areas in these schools.

All Group One and some Group Two schools demonstrated sustained skill-building in language and literacy techniques, such as writing across the curriculum, Reading for Real, and whole-language approaches. Staff from several schools were trained in the Reading for Real approach, which emphasizes the real-world context of reading and helps students connect texts with their experiences and those of their peers. Some strategies teachers used in language arts instruction were the following: teachers encouraged students to write in journals, read novels, research historical and social topics for essays, produce visuals and charts, and use technology for research and writing. An eighth-grade class in a Group One school, for example, collaborated on writing stories:

> The class was divided into groups of four-to-six students seated around five tables. The teacher instructed them to begin writing a paragraph on "What I did over spring break." Each student then passed on his/her paragraph to the student on the right, who continued the story by adding a paragraph. When the story had been passed around the table, it was considered complete. Students read their collaborative story with giggles and exclamations. The teacher then asked for volunteers to read their story aloud. Three students read their stories to the class. The teacher was comfortable with the excitement and interaction as the essays were passed from writer to writer. Most students were engaged in the work, and sought to make their stories funny, creative, and suspenseful. *(Observations during site visit)*

Another curricular area that received attention in all schools was mathematics. Most CSI schools had staff trained in Connected Math, and principals were very supportive of this approach. A Group One principal noted, "I can see the difference in the kids when we use this interactive approach. They were not like this with the Chicago Math approach." Connected Math, as the name suggests, is an applied approach to teaching and learning math, where students learn mathematical concepts and solve problems through interactive games and hands-on activities. There was usually a brief presentation by the teacher on the concept to be learned. Students had partners or teams with whom they worked on problems using manipulatives, or worksheets

resembling game boards. In some cases, teachers indicated that the teams were mixed to include strong and less-strong math learners. Several Group One teachers usefully combined cooperative learning with the Connected Math approach. Principals reported that younger teachers especially favored this approach.

> A fifth-grade class in a Group One school (K-8) sorted M&M candy into piles by their colors, made frequency bar graphs by color, discussed size, shape, and weight of an M&M, brainstormed reasons for higher and lower frequencies—"Why are there are more yellow M&Ms than the others?"—and wrote a report on their hypothesis, methods and findings. Students made inferences, for example, that candy-lovers favored yellow coloring and each packet contained slightly differing numbers of M&Ms because they were packed by weight, not by quantity. *(Observations during site visit)*

Group One and some Group Two schools demonstrated proficiency in using hands-on learning and thematic curricula in science and social studies as well.

> The Middle Start Networking Conference in spring '98, showcased excellent examples of real-world curricula in several CSI schools. Most schools demonstrated an understanding of long-term thematic projects, need to tap multiple intelligences, and use of student portfolios as qualitative indicators of student progress. For example, a social studies teacher from a Group Two school recreated the trajectory of a colonial kingdom in her classroom where she played the role of a queen and her students were ministers, soldiers, professionals, and citizens. Over the course of the year the class learned about the birth and death of colonialism through research, reading, production and simulation. Students maintained a portfolio of their work over the course of the project. *(Observations and discussion during conference)*

All Group One schools demonstrated expertise in service-learning. In the best instances, service-learning was not an "add-on," but an essential part of curriculum and instruction. Schools' strategies of parent and community involvement included service-learning projects that ranged from food collection drives for low-income families before major holidays, to health fairs, writing projects, and environmental projects with a strong curricular focus. (Service-learning is also discussed in the section on parent and community involvement in chapter three.)

> A Group One school, widely acknowledged as a demonstration site for service-learning instruction and curriculum, focused on students becoming strong learners interested in improving themselves, their families and their community. The "Rite of Passage Program," for example, is described by the principal as a long-term program of learning that precedes a ceremony to recognize students' passing from middle school to high school. Eighth graders "collaborate with their teachers,

> parents and peers in selecting three major projects to be completed as part of their passage requirements . . . Improvement of self could include the reading of a biography about a positive role model, followed by a written book report and an oral report explaining how the student plans to apply the characteristics of the person into his or her own life . . . Community improvement could include individual or group projects that benefit senior citizens, the homeless, the school, the environment, etc." *(From a paper by a Group One principal)*

The TA partner to the same Group One school described another service-learning project that demonstrated the school's established structure for institutionalizing new innovations schoolwide. The principal of this school had made a presentation on action research during a staff meeting. The TA partner wrote:

> When teachers reported on their service learning projects to other teachers at the end of the year, all of them had included action research in their projects and reports. Some used surveys that are in the literature, others designed their own to reflect the nature of the project, often in conjunction with students. Students of all ages routinely conducted the surveys, analyzed the data and compiled the reports. *(TA partner report)*

Technology in education was a growing area in Group One schools. A few schools were integrating technology into curricular projects, in ways similar to service-learning. Technology was a tool of test-taking and assessment, which gained favor with students. Some staff felt they needed more training in computer applications and technical support during implementation to provide students real opportunities to use computers for research and writing.

> Students in some Group One schools used the Internet for research and kept in touch with pen-pals from different countries through electronic mail. Teachers provided opportunities for students to connect their interest in using computers to writing and reading activities. *(Observations and discussions during site visits)*

> A Group One school used reading software that allowed students to test their reading level, pick books at that level, read the books, and take a computer test to rate comprehension. The computer provided a grade, as well as recommended the levels that the student should proceed to as a next step. Students showed enthusiasm using this program. One student, for example, was disappointed that he was reading below the level he thought he could read. The teacher encouraged him to pick a book between the level he wanted to read at and the one the computer recommended for him. He brightened visibly and picked a book on reptiles that fell in between the two levels. (*Observations and discussions during site visit)*

Several examples of long-term, thematic projects were demonstrated by Group One schools in all the content areas. The most advanced schools pursued projects that integrated curriculum with service-learning and technology as well. However, themes that guided the houses and learning centers discussed in the previous section (e.g. the bee house, Planet Hollywood) remained an instrument of school reorganization and did not usually extend to curriculum and instruction. They were presented more as logos than as curricular themes. There appears to be great potential for integrating themes for houses and learning centers with curricular themes in Group One schools.

Instructional strategies. All CSI schools engaged in staff development in some or all of the following: teaming, cooperative learning, and heterogeneous groupings. Staff learned about brain research, multiple intelligences, and alternative forms of assessment. Group One schools showed the greatest variation and expertise in instruction. Staff in these schools were teaming effectively; students were in cooperative groupings; and some Group One and Group Two schools implemented special education inclusion projects.

> Teachers reported widespread use of cooperative learning and emphasized its benefits for students. A teacher said, "Children like interacting with their peers, the small groups are easier to supervise." Another teacher stressed the proximal development aspect, "I make sure the groups have strong and weak learners. They learn a lot from each other." *(Group One teacher interviews)*

Teachers used cooperative learning with great skill in several Group One and some Group Two schools. A small number of Group One and Group Two schools also used cooperative learning in special education inclusion programs:

> In a regular education science class in a Group Two school, a teacher demonstrated the chemical reaction that occurs when aluminum makes contact with copper chloride solution. Tables were arranged in groups of four students each. Chemicals, beakers, and other materials were neatly arranged on a work area on one side. Students had a copy of the steps of the experiment. Each group had someone in the role of a gopher, captain, and a reader. The teacher told the story of the beautiful Chlorina and handsome Copper in a blissful marriage. They meet Big Al at a wild party where everybody has too much to drink. Chlorina elopes with Big Al. Copper is devastated and alone. Students enthusiastically followed the steps of the experiment and wrote their results in the small groups. The teacher asked captains to check on their team mates and facilitated groups that had difficulty with their roles, or aspects of the experiment or writing. *(Observations during site visit)*

> A Group Two school was testing a special education inclusion pilot using cooperative learning principles, to team special education students with regular education students. The seventh-grade math teacher and special education teacher team-taught classes. In the class observed, students sat in groups of four. Teachers facilitated the groups by giving them numbers, and assigning tasks to each number. The "ones" talk for the group, the "twos" write down the problem etc. Students exchanged numbers after each problem. The special education teacher selected tables to answer questions by spinning around with one hand extended. The turn to solve the problem was given to the group that she was pointing to when she came to a stop. Students were actively engaged in solving their problems. There was noise and humor, as students forgot their roles, or debated answers. The regular education teacher cautioned them, "quiet now," every now and then. The two teachers circled the classroom, stopping at tables when students requested assistance. Later, in a conversation, the teachers said that students from both streams enjoyed their math classes more, and performance was improving in both groups. The principal said, "I am very proud of their work. I hope we can expand inclusion into a schoolwide program next year. *(Observations and discussions during site visit)*

Developmentally responsive pedagogy. All Group One and several Group Two schools also received training in developmentally responsive education. Staff and administrators from several CSI schools attended workshops on the needs of young adolescents, multiple intelligences, and conflict resolution. Teachers and administrators in all Group One and some Group Two schools integrated their knowledge and skills in developmentally responsive pedagogy into curriculum, instruction, assessment, conflict resolution and advisory with great expertise. TA partners were able advisors on ways in which schools could balance their focus on being "safe and nurturing environments for adolescents" with a rigorous academic program. School reorganization interventions (such as block-learning time) and teaching strategies (such as cooperative learning) were integrated in several CSI schools for middle-grades-appropriate-education. Some strides were made in parent and community involvement, as well. Principals, teachers, counselors, TA partners and other participants in the schools felt that the overall school climate had improved. The following developmentally responsive strategies were observed during site visits, and described during interviews:

> Several schools displayed colorful examples of student work in hallways and classrooms; thematic houses or learning centers fostered a sense of belonging. *(Observations during site visits)*

Principals and teachers worked with students to resolve conflicts in ways that promoted understanding on the part of staff, and teacher teams worked on academic as well as social troubles with students and parents, as seen in the use of common planning time. *(Observations during site visits and interviews with administrators and staff)*

Instruction was more hands-on and there were greater opportunities for cooperative learning, as evidenced by the use of math manipulatives, long-term projects-based instruction in social studies and language arts, and team-centered work in science. *(Observations during site visits and networking conference)*

Schools promoted community participation in student-led events such as health fairs, talent programs and open houses. (Community participation is discussed in detail in chapter three, "Partnership"). Most Group One and Group Two schools developed strategies to involve parents and community members in curricular projects and assessment, and take students into their community for projects with a service-learning focus. *(Observations during site visits, and interviews with administrators and staff)*

Role of Leadership

By the 1997-98 school year, administrators and teachers in Middle Start schools demonstrated leadership in their school communities, which helped maintain the schools' focus on the goals of the initiative and deepened the school communities' commitment to reform.

The leadership of Middle Start consisted of both administrators and teacher leaders. The combined strength and harmonious relations between these two groups greatly influenced the success of the schools' reform efforts. The vision and stability of some principals, assistant principals, and key teachers enabled many schools to overcome fear and doubt, and to set and achieve high goals. TA partners provided strong support to administrators and teacher leaders within schools (the role of TA partners is discussed in detail in chapter four). Cross-school networks also strengthened leadership and enabled schools to share information and assist in resolving challenges collaboratively (this is discussed in chapter three). All Group One and some Group Two schools were characterized by strong administrators and teacher leaders. Other Group Two schools experienced frequent changes in administrative staff and relied more on teacher leaders for leadership of reform efforts. Group Three schools were severely challenged by

administrator turnover. They made the case for the importance of stable administrative leadership to a reform effort such as Middle Start.

Administrators. Administrators played important roles in integrating school improvement plans with Middle Start efforts, using the Middle Start Self-Study and other forms of data collection to reflect on school progress and ensuring follow-up implementation of professional development. Administrators also facilitated their school's collaboration with other Middle Start administrators and teacher leaders on current middle-grades concepts through statewide networking conferences and regional networks. They also engaged parents and community members to play a greater role in the school, and for teacher leaders and TA partners to participate in decision making.

Administrators, including principals and assistant principals, played key roles in determining the extent to which Middle Start influenced school improvement in schools. An indicator of this was the degree to which schools' Middle Start goals overlapped with school improvement goals. Several Group One and Group Two schools made social equity, developmental responsiveness and academic achievement a high priority in their school improvements efforts. In some cases where school districts questioned their practices, administrators elicited support from school district officials to buy into the middle school concept and also advance the concept among other schools in their district.

> A Group One school that had aligned implementation of its Middle Start effort with its school improvement plan, listed the following as key areas of work undertaken: scheduling; teaming; detracking; building learning centers; staff training in affective development; cooperative learning and active learning. This was in contrast to a Group Two school where the principal decided that the school would prioritize academic achievement over the other goals, due to MEAP pressure from the school district. *(Group One and Group Two principal interviews)*

Administrators and teacher leaders in Group One schools worked with TA partners to identify key findings in their Middle Start Self-Study and integrate them with their school improvement plans. Most schools found this to be difficult, but a few administrators made this an important focus of their work.

> A Group One school principal worked with the TA partner on using the Self-Study data to prioritize professional development choices according to teachers' areas of interest. *(Group One principal interview)*

Administrators in Group One schools also instituted systems of schoolwide reflection and planning. This was one of the ways in which Middle Start became both a decentralized and collaborative reform effort. Some formats within which this was conducted included retreats prior to the beginning of the school year, weekend workshops during the school year, or special staff meetings focused on self-assessment and reflection.

> A Group One school held a three-day retreat for administrators, staff and parents prior to the beginning of the school year to brainstorm, plan, and resolve difficulties in a schoolwide teaming project. The retreat bolstered team spirit and enabled staff to begin the school year with a "renewed sense of purpose." *(From TA partner report and Group One principal interview)*

Principals of Group One schools demonstrated leadership in ensuring that Middle Start efforts in their schools were comprehensive, schoolwide, as well as anchored in classroom practices. With the help of TA partners and teacher leaders they selected professional development opportunities that were aligned with school goals, provided support during implementation of pilot projects and in-house demonstration workshops, facilitated intervisitations with other Middle Start schools with higher levels of implementation on similar projects, and maintained an overview of the connections between school reorganization, curriculum, instruction, and professional development.

> A Group One principal encouraged his staff to follow a methodical plan of implementation. "We do not implement, for example, block-learning until everyone in the building has a very clear concept of what this means. We have to be trained in new concepts before we bring them to classrooms. We can't add things piecemeal and expect our school to change effectively." *(Group One principal interview)*

Statewide networking, regional networks, and teacher intervisitations are discussed in detail in chapter three on partnership. Administrators played key roles in facilitating these opportunities. They worked closely with TA partners, other representatives of AED, and the Kellogg Foundation in planning their role in the statewide networking conferences held at the foundation's headquarters in Battle Creek, Michigan. They committed themselves to meet with other administrators or send representatives from their schools to regional networking meetings of Middle Start schools on a monthly basis. They also allowed time and arranged for substitutes so that teachers from their school could train, or go to be trained, in other Middle Start schools.

Teacher Leaders. Almost all CSI schools had strong teacher leaders involved in the design and implementation of Middle Start in their schools. Teacher leaders played a complementing role with administrators in planning professional development, ongoing implementation, and special events (e.g., intervisitations, retreats, etc.). They played leading roles in planning and implementing curricular and instructional interventions. In some Group One schools, they planned and conducted parent and community involvement activities, either as afterschool events, or as part of service-learning projects. The most important role of teacher leaders, however, was in fostering teacher collaboration and extending the implementation of teaming and interdisciplinary instruction.

> A Group One school that has successfully integrated thematic units, cooperative learning and alternative assessment did so because of the enthusiastic efforts of teacher leaders who participated in pilots, wrote curriculum, demonstrated techniques at staff meetings, and urged schoolwide participation in informal conversations with other staff. *(Group One TA report)*

In cases where there was a new administrator or a gap in leadership resulting from changes in administrators during the school year, teacher leaders and TA partners collaborated on the implementation of Middle Start. The case of the Group Three schools, however, showed the pivotal importance of administrators to sustained implementation:

> A Group Three school faced severe difficulties with implementing Middle Start goals during the last academic year because of the transitional nature of its leadership, as well as the retirement of key teacher leaders. In previous years the school showed promise in implementing curricular, instructional and other interventions. Teacher leaders worked closely with TA partners and the previous principal to bring about these changes. In a short period during which there was a gap in leadership, despite the dedicated efforts of the TA partner and remaining teacher leaders, the school experienced difficulties in continued implementation. The new principal thus assumed his position at a difficult time. The school has yet to regain the momentum of its work on Middle Start. *(TA partner report)*

Administrators and teacher leaders thus collaborated in implementing Middle Start. Teacher leaders played especially important roles in instructional and curricular areas. Administrators played facilitative roles in these areas, but pivotal roles in school reorganization, overall management, and coordination and networking.

Comprehensiveness and Integration of Reform Efforts

All CSI schools showed increased expertise in middle-grades reform. Group One schools demonstrated high levels of expertise in curriculum, instruction, and school reorganization. They developed strategies for parent involvement and were involved in networks of middle schools. Technical assistance partners, administrators, and staff teams developed systematic strategies of implementation:

> A lot of our staff feel like we have a pretty good base of knowledge already about what middle school students are like and so we just kept expanding on that, trying to get these programs in operation. *(Group One teacher interview)*

All CSI schools became more comprehensive in their reform efforts as Phase I progressed. An estimation of the comprehensiveness of their Middle Start effort was based upon the 10 dimensions of Middle Start: curriculum, instruction, student assessment, professional development, program evaluation, school organization, school climate, internal and external communications, family involvement and school-community partnerships

School profiles collected in the cluster evaluation this year showed a broader range of strategies in all schools relative to 1996-97. Group One schools illustrated a range of "working examples" of comprehensive middle-grades reform. Some common features of Group One schools were varied curricular and instructional strategies, innovative scheduling, and "house" structures. Schools, however, maintained unique profiles. In part, their uniqueness came from their varied regional, racial/ethnic, and socioeconomic characteristics; other factors were the combinations of interests they pursued. Some of these combinations are listed below:

- Service-learning, whole language, and technology in education
- Inclusion, conflict resolution, cooperative learning
- Inclusion, parent and community involvement, student-led projects
- Technology in education, thematic houses, MEAP-focused curriculum

Group One schools demonstrated the most comprehensive and integrated approach to implementation; their administrators and staff avoided piecemeal implementation efforts. For example, a Group One school with well-established service-learning and whole-language programs began implementation of technology in education projects with the help of a university partner. The TA partner of the school wrote:

> It took time (for the university partner) to settle down and do what the school wanted them to do, instead of just replicate what they were doing with other middle schools in another district effort. The university team is now working with staff on a technology plan which is based on the existing curriculum (in service-learning and whole language). *(TA partner report)*

As has been noted, a number of Group One schools were viewed as "demonstration sites" by other middle schools. Staff in some schools became expert practitioners in areas such as service-learning, cooperative learning, student-led conferencing, inclusion, and integrated units. They made presentations at conferences, held inservices at other schools, and were observed by visiting teachers on practices related to their area of expertise. The goal of a rural school, for example, was to prepare staff to conduct professional development in schools in remote, rural areas of Michigan.

Group One schools also demonstrated strategies of sharing, reflection and self-assessment. Some strategies included data collection through student, teacher and parent surveys, "unpacking the Self-Study," as a tool for reflection, and collectively examining student work. The TA partner to a Group One school wrote:

> Several sessions were spent on service-learning with teachers sharing what they were doing in their classes with each other. Very little blaming of students goes on. The expectation in this school is that people look at data, are constantly trying to improve the program for students, and that there are criteria to guide them in their decision making. *(TA partner report)*

The above chapter on changes in expertise, discussed the content and use of professional development in CSI schools in the areas of curriculum, instruction, and developmental responsiveness; the key roles played by school leadership, including administrators and teacher leaders in reform efforts; and the degree of comprehensiveness and integration of reform efforts within schools.

Chapter Three

Partnerships

This chapter describes the different levels of partnerships—both within and across-schools that developed in Middle Start. Within-school partnerships involved TA partners, administrators, staff, parents, students, and school district personnel. Cross-school partnerships included regional networks of Middle Start schools and a statewide network of CSI schools that came together in two meetings each year.

Within-School Partnerships

Most Group One and Group Two schools fostered collaborative relationships among all their stakeholders. "A sense of ownership" was a phrase heard in staff and administrator descriptions of their school climate. Increased time for professional development, teaming, and the guidance of TA partners facilitated staff collaboration. Principals felt supported by TA partners. Students worked on a greater number of cooperative learning and service-learning-type projects that involved peers, teachers, and community members. Schools developed more opportunities for parents to participate in workshops, curricular projects, and other activities in the school. A few Group One schools served as working examples of good middle-grades reform in their school districts. The following section describes staff collaboration, student engagement, parent and community involvement, and relations of the CSI schools with their districts.

Staff collaboration. Administrators, staff, and students were served well by positive changes in school climate. The previous section discussed the advantages for administrators. In addition, staff participation in task forces, committees and action teams increased as decision making became more decentralized:

> A teacher from a Group One school said, "Our faculty meetings are fascinating. It's nice to feel like you participated in a decision that impacts children." *(Group One teacher interview)*

> A Group One school surveyed staff on professional development choices and based its professional development priorities on survey data. The principal reported that staff involvement in planning, professional development, and

teaming brought a sense of ownership of the reform process. *(Observations and discussions during site visit)*

Student engagement. The previous chapter described curricular and instructional innovations in CSI schools, including greater use of cooperative learning, hands-on instruction, and real-world and thematic projects. As could be seen in the discussions in previous sections, students experienced more frequent opportunities to learn in cooperative teams, engage in active learning projects that drew on their experiences, and work with teachers to assess their strengths and build on them. Students also received more consistent attention from their grade-level teacher teams. Classroom management and discipline improved as teacher teams worked with each other and with parents to address student issues in a constructive manner. These and other improvements enabled students to interact with their peers in a variety of constructive ways, heightened staff sensitivity to the developmental phase of middle-grade students and improved staff-student relationships. TA partners and staff from some Group One and Group Two schools reported that "students seem to be having more fun with learning." Administrators from several schools reported improved attendance and steady improvements in MEAP scores. The following example of student-led conferencing in a Group One school exemplifies Middle Start's comprehensive priorities, partnerships among stakeholders and integrated goals for youth:

> Student-led conferencing, in the words of the principal, "puts students in charge of their parent conferences, giving them responsibility for evaluating their achievements and progress." During the academic year students developed portfolios of their work in consultation with teachers. They included a range of work and reflected on what entailed "good" and "bad" work. During times scheduled for parent-teacher conferences, they made individual half-hour appointments with parents. *(Group One principal interview)*

The principal described the following scenario:

> Teachers set up the library as a conference area with soft music and refreshments —a nice, warm atmosphere. Students were seated at tables with centerpieces, alongside their parents. They explained their work and its progression, "This was one of my earlier papers, these were the really good things about this paper, and these were the things that I needed to improve on. You'll see with this paper (written at a later time) that I was using examples much better and I'm gaining in that skill." Teachers were also present to answer parents' questions and guide students through difficulties. *(Group One principal interview)*

Parent attendance of these events was overwhelming (more than 90 percent), according to the administrator:

> Initially parents were grouchy about it: "Well, we don't like this new format but we'll go through with it." Halfway through the conference they were saying, "Boy, I'm really eating my words on that one." I think it's probably one of the most meaningful strategies, it focuses on instruction, assessment, student responsibility, parent involvement, and teacher-student relationships in an integrated manner. *(Group One principal interview)*

Parent and community involvement. This was a difficult area for most schools. Group One schools made some strides in this area in the last year through teaming and special events with a service-learning theme. In some schools, teacher teaming fostered more discussion between parents and teachers on student behavior and engagement in learning. TA partners, principals and teachers alike remarked on the beneficial effect of teaming on parent involvement in student learning:

> Parents see that there is a unified effort behind their child. I think that improved team efforts brought them in. *(Group One teacher interview)*

Special events, workshops for parents and community members, and service-learning projects enabled interactions between parents, community members, staff, and students in most Group One and some Group Two schools. Some types of school-community events were career day, community writing projects, a beach sweep, and collections for local charities for major holidays. In some cases, community organizations took an active part in organizing events with the school. For example:

> "Healthy Heart," a project in a Group One school was a school-community collaboration with strong links to curriculum. Students explored disease, diet, community resources and careers in health. Staff and students worked with a local hospital to organize free testing of community members; presentations on family health by doctors and community members; and a dinner (vegetarian pizza and fruit). They also distributed student-made pamphlets and brochures related to better health. The principal said, "There were 400 people here to attend the event! All these parents in the building, doing things, seeing their kids in action." *(Group One principal interview)*

Relations with school district. Schools frequently received support from districts—particularly where district policies were aligned with Middle Start goals or when central office administrators demonstrated leadership in middle-grades educational reform. Schools experienced difficulties in relationships with their school districts in two main areas: school districts ruled by MEAP-oriented curricular and assessment strategies expressed reservations with Middle Start instructional and assessment approaches; and middle schools located in K-12 buildings, or belonging to small school districts, felt pressure to conform to guidelines that applied to all three levels. Some schools had difficulty accessing Middle Start grant funds that were processed through school districts.

In some cases, schools overcame these obstacles. For example, two Middle Start schools pulled in the third middle school in their school district into a middle-level network that promotes effective middle-grades practices. They made the case to district officials that these practices had benefited two schools and would improve the performance of the third. They planned a summer workshop in cooperative learning for all three schools. Two other Middle Start schools in another city did not have success networking with other middle schools in their district. They reported some progress, however, in convincing the school district about the value of middle-grades practices for the whole district. The MEAP curriculum was at least partly aligned with newer curricular and instructional strategies. Staff in all schools, however, felt this greatly increased their workload and responsibilities.

On the whole, parent involvement improved somewhat in most CSI schools, with parents present in greater numbers in school, as well as active in school-community events. However, partnerships with school districts proved difficult for most schools, and somewhat impeded progress in curriculum, instruction, and networks of middle schools within the district.

Cross-School Partnerships

Staff and administrators from CSI schools participated in spring and fall networking conferences hosted by the Kellogg Foundation and AED; and eight of the 12 schools organized themselves into two networks with the help of TA partners. These regional networks evolved as a response to commonly felt needs on the part of schools. Staff and administrators alike stressed the benefits of their participation in regional and statewide networks. Encouraged by experiences

with networking in Phase I, Middle Start TA partners played key roles in organizing and managing networking activities; they recommended a greater focus on formal networks in Phase II of the initiative.

Participation in statewide networking conferences. The twice-yearly networking conferences held at the Kellogg Foundation were well attended by administrators and teachers from all schools. They provided an opportunity for CSI grantees to share information and innovations, and reflect on their progress. Participants described these experiences as "energizing," "enlightening," and, most importantly "validating." One teacher described her participation as "a proud moment." The conferences therefore both showcased the best practices in Middle Start, as well as allowed teachers to experience a sense of accomplishment. Schools that did not belong to a smaller regional network especially valued the exchanges, as described by one principal:

> I talk to the other schools and principals in the networking meetings and those are validating and refreshing. I have realized from these exchanges that the work an educator does in a day does not differ all that much in rural and urban schools. *(Group One principal interview)*

The two main objectives of statewide networking conferences were to provide a forum for sharing and discussion among Middle Start schools on their progress and challenges, and to allow professional development organizations and partner organizations to present new ideas and concepts in middle-grades education. Some meetings followed a workshop format and served as further professional development for participating schools. Other meetings provided opportunities for schools to share aspects of their work with the other schools, and receive feedback. At the 1998 spring networking conference, for example, staff and administrators from 11 of the 12 schools presented samples of student work from their school and engaged in a discussion with facilitators and TA partners using the Tuning Protocol.* The presentations covered the different content areas:

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* A format developed by the Coalition of Essential Schools that enables groups to provide constructive feedback to a presenter.

> There were several examples of thematic instruction, hands-on learning, long-term projects and alternative assessment. For example, a teacher from a Group One school presented samples of student work from her science class. Her instructional strategy combined social, artistic, scientific and real-world aspects in a study of the human body. Students engaged in the following projects as part of their course of study over a marking period: they studied a cell from their cheek under the microscope; heard presentations from health professionals on careers in science; connected disease with social conditions in their communities; represented health data in charts and Venn diagrams; and drew organs with anatomical accuracy. The group of Middle Start teachers listening to the presentation discussed her use of block-learning time, portfolio assessment, and thematic interdisciplinary instruction. They expressed their appreciation of the breadth and depth of coverage of topics. They recommended ways by which to strengthen assessment strategies—e.g., by clarifying the benchmarks she was using. *(Observations and discussion during meeting)*

In yet another format, the fall networking conference in 1997 featured a presentation by Dennis Sparks from the National Staff Development Council:

> The session titled, "Teaching, Learning, Assessment, and Staff Development—Results-driven? Standards-based?" provided an opportunity for representatives of the CSI schools to examine the course of their reform effort in the light of his discussion. Schools worked in their school groups to develop plans on the theme, "Three steps we can take this year to move forward results-driven middle-grades education." The schools also examined their Self-Study data and made connections to priority areas in teaching, learning, assessment and professional development. *(Observations during meeting)*

Collaboration through regional networks. In the words of a participant, the two regional networks were "a powerful outcome of Middle Start." Regional networks grew out of schools' needs to share the expertise of TA partners, and, also in some cases, grant money awarded to a consortium of schools. The networks helped schools arrive at a common purpose, explore middle-school concepts in depth, disseminate informational materials, and share lessons learned. Their collective strength helped them develop arguments for departures from mandated structural and content strategies with school districts, replicate or adapt successful innovations among the network and beyond, and provide a support system of peers with similar agendas. In the case of schools sharing grant money, the network was a cost-effective way of benefiting from technical assistance and professional development. An administrator said:

> Networking, much more than anything I've ever seen or been involved in, motivates me. We are all there and we all share ideas and even beat up on each

> other on what we are doing and give each other feedback. *(Group One principal interview)*

TA partners uniformly received praise for their leadership role. Another administrator noted: "The TA partner has been really phenomenal in bringing us together."

The structure of regional networks consisted of monthly meetings at a designated location among a specific group of participants. One network comprised a TA partner and four principals. The other consisted of two TA partners, administrators and teachers from four schools. The meetings usually lasted two or more hours. The main work undertaken at meetings included some of the following: updates on individual schools' progress on implementing middle-school concepts; debriefing implementation problems; discussing professional development opportunities; and planning intervisitations. The following is a brief description of the final meeting of a regional network for the 1997-98 academic year:

> The final meeting included administrators and teachers from four schools, and one of their TA partners. To commemorate their year of collaboration they brought muffins and coffee, and met at a participant's house, instead of the TA partner's office. Participants greeted each other warmly as they settled down for the meeting. Each school updated the group on their progress with implementation. One school, for example, reported on the steps taken by staff to revise the awards ceremony so that students received recognition for improvement as well as achievement. Another school discussed frequent changes in administrators; a representative said, "If they keep leaving we just have to rely on our teams." The TA partner presented a new middle school curriculum developed at her university.
>
> Later, the group discussed ways in which they could look for student responses to instruction, to see if instruction is on-target. They also devoted time to discussing how they could maintain ongoing discussions on topics, so as to come up with useful guidelines. One of the schools responded enthusiastically to this, saying it would enable them to convince their administrator that their attendance of networking meetings was useful schoolwide. A teacher said, "the principal was curious about why the Kellogg committee needed so much time away from the building. Although he believes the inservices and workshops are good for the teachers, he is unsure if the payoff is even because it interrupts the learning of students. If he witnessed more strategies learned at the meeting in the classroom, then he would be more convinced that the time out of the building was worth it. *(Observations and discussions during site visit)*

There were several examples of tried-and-tested middle-school concepts spreading as a result of networking. The meetings also allowed administrators and staff time to plan systematic

exchange through intervisitations, training sessions and technical assistance. Said one administrator:

> Working with the network I feel I should get 10 hours of graduate credit. I learn so much. For instance, inclusion is practiced in the other schools. So I sent my special education teachers to two of the schools. They spent the morning there and came back and debriefed in the afternoon. Soon after we came up with our inclusion plan. We invited a couple of teachers from the other school to come in and talk to us. We felt we needed not just a professor but also actual teachers to have our staff see that teachers are actually using the system. *(Group One principal interview)*

In some cases, schools included non-grantee schools in their networks. A citywide network of middle schools spearheaded by Middle Start schools were negotiating inclusion of middle-school concepts in their school district's agenda. Overall, most participants felt that networks had "put us further than we would be if we were on our own."

In summary, the within-school partnerships in CSI schools included collaborations between and among staff, administrators, parents and community members, and students. Cross-school partnerships took the form of twice-yearly networking meetings of the CSI schools and monthly meetings of smaller regional networks of schools. Benefits accruing from such partnerships included greater opportunities for sharing expertise, an efficient use of professional development time, and systematic relationships within and among schools that could sustain momentum past the grant period.

Chapter Four
Technical Assistance

This chapter describes the Middle Start technical assistance (TA) offered to CSI schools and networks; the TA partnerships that developed; and schools' views of TA. This chapter is based on discussions with and reports and meeting notes from technical assistance partners; annual reports from schools; and interviews with principals and teacher leaders. The cadre of TA partners in the 1997-98 year consisted of five Michigan-based educators, one of whom was new to the team and was replacing another partner who moved out of state.

The cluster evaluation report from 1996-97 discussed the forms and content of technical assistance in some detail. The main roles played by TA partners in previous years included consulting with administrators and teacher leaders, guiding professional development choices, organizing professional development, and providing advice and support for implementation. TA partners were guided by the 10 dimensions of Middle Start in their work with schools. Some of them encouraged schools to identify key findings in their school improvement Self-Study, and integrate them in planning and implementation.

The 1997-98 cluster evaluation data show that TA partners continued to perform the above tasks, but there were noticeable changes in their approach to this work. This year, TA partners assumed a more directive (or intentional) role in ensuring that school improvement was schoolwide, comprehensive, and integrated, and in the words of one partner "related to what is going on in the classroom."

The five TA partners also formed a network that met almost every month, either face-to-face, or via teleconferencing, to update one another on progress of their respective schools, discuss specific problems related to planning and implementation, and share research materials and other resources. Most TA partners felt that their roles in schools had grown over the years because of their expertise in middle-grades education, knowledge of the Middle Start schools, and positive relationships with staff and administrators in these schools. A TA partner, in a memo to the TA group, declared that "orientation of TA partners was changing from that of initial observers and information/resource providers to a more activist orientation, seeking to influence thinking and action in relation to Middle Start philosophy."

Overall, administrators and staff welcomed their guidance and support and considered their respective TA partners "a guide," "a critical friend," or (in one school) "a lifeline." The regional networks of schools had similar feelings toward TA partners who headed these networks (see also section on networking in chapter three).

Thus, the main areas of change in technical assistance had to do with TA partners playing more intentional roles in their respective schools and in cross-school partnerships; and the development of more cohesive partnerships among TA partners as a result of regular and ongoing (almost monthly) meetings. In this role, TA partners were the catalysts for Middle Start to influence schools in ways that furthered student outcomes. TA partners enabled administrators and teacher leaders, within schools and networks, to meld the ideology of Middle Start grant-making, the vision of the National Forum to Accelerate Middle Grades Reform, and the schools' own goals for school improvement into effective school-level strategies and classroom-level practices.

Group One schools made great strides with the guidance of TA partners. Group Two schools often sought the aid of their partner to develop strategies to increase parent involvement, teacher participation on a schoolwide basis, and resolve difficulties caused by changes in leadership. Group Three schools, despite the best efforts of TA partners, could not sustain Middle Start efforts without stable leadership in their building. (This issue is discussed in some detail in the next chapter.)

The following sections describe (1) the work of TA partners in schools and networks, (2) the partnerships that developed among TA partners, and (3) schools' views of the contribution of TA partners in furthering Middle Start efforts to attain positive outcomes for students. In all three sections, attention will be paid to the increasingly intentional nature of technical assistance.

Technical Assistance in Schools and Networks

In keeping with curricular, instructional, and organizational changes in schools this year, TA partners worked on three distinct areas in schools:

- They helped administrators and teacher leaders maintain a bird's-eye view of reform in their schools.

- They coordinated and/or participated in particular efforts in implementation, especially with regard to school reorganization, professional development and leadership development.

- They nurtured partnerships within and especially among schools through their management and coordination of regional school networks.

Site visits by TA partners included meetings with administrators and teachers, visiting classrooms, shadowing students, and reviewing samples of student work, and samples of curriculum, and attending professional development events and staff meetings and/or Middle Start team meetings. Some TA partners also became familiar with other groups such as universities, and professional development resource agencies that were implementing programs in their schools. In some instances, partners integrated their work with that of these groups, to enhance the coherence of the school's overall effort. They ensured that reform efforts in the schools were comprehensive, integrated, and connected to the three goals of middle-grades education (academic achievement, developmental responsiveness, and social equity). In performing this role, partners consulted with administrators on school reorganization, and guided administrators and staff on professional development, curriculum, instruction, and assessment.

The TA partner role of "critical friend" was an effective strategy of leadership development, and the development of school-level expertise. TA partners frequently consulted with principals over the phone and in person and attended staff development events with principals and staff. They sometimes served as expert consultants in staff development on such topics as middle-grade students' developmental attributes, interdisciplinary instruction, and teaming. They also contacted external experts on behalf of their schools or put teachers in contact with trainers. In this way TA partners facilitated professional development on cooperative learning, inclusion, integrated curriculum and alternative assessment. They attended several of these sessions with staff and followed up on planning and implementing crucial reform efforts based on new expertise with staff and administrators. For example:

> A TA partner led a retreat on teaming in a Group One school he worked closely with. He describes the experience thus: "I was an active participant. The planning committee for the retreat would seek my input on the agenda and selection of presenters. I spent the three days of the retreat event on site. I delivered formal presentations. This way I got to interact with some participants at a level I would

not have had the opportunity during my site visits. Occasionally, my interactions served to influence the thinking/action of participants." *(TA partner report)*

In a few cases the TA partner filled in the breach left by changes in leadership. This predicament was discussed in depth by the TA partners group at their monthly meetings. They felt that their involvement in their schools, and the trust that the staff placed in them, made it difficult not to intervene when the school faced issues related to inadequate or changing, leadership. However, they also felt the need for definitions of the scope of their activities, as it was controversial, time-consuming, and personally trying for them to take on the responsibilities of leading a school, even for a brief period of time. Despite the best efforts of TA partners, however, schools with difficult leadership issues, did not achieve the results seen in schools with strong leaders. In a Group Three school, for example, frequent changes in leadership and retirement of key staff severely challenged the progress of reform efforts. Staff relied on the advice and leadership of the TA partner, up until a new principal was appointed. The new principal said:

> She brought me up to speed on the grant, what staff development was done, gave me ideas, did some of the research and leg work. I was just starting from scratch; she was my contact person. *(Group Three principal interview)*

The TA partner to another school wrote:

> At this point organization and management of the school seems teacher-based. Teachers have no respect for the new principal. I have tried to work with him and acquaint him with the characteristics of the excellent staff. It is not sinking in and he has done little to promote and support his staff. I finally indicated in a directive way that I would work with each grade level for half a day in May to get them prepared for September. *(TA partner report)*

TA partners, in some cases, also were leaders of, or active participants in, cross-school networks of Middle Start schools. Two such networks included four of the 12 Middle Start CSI schools. (At the time of writing of this report, a new network was being planned for the remaining four schools). A TA partner convened principals from four schools from the same region in a principal's network on a monthly basis (see discussion in chapter three). She worked with one of the four schools as a TA partner, but extended her guidance to all members of the

network through the monthly meetings. The other three principals reported that they gained expertise and confidence in implementing interventions, such as inclusion or cooperative learning, through their interactions with her, as well as other members of their network. The partner also maintained meticulous logs of all meetings, and outlined next steps to be implemented and issues for follow-up in forthcoming meetings of the network. For example, the TA partner reported on the group's discussion of a "broadened leadership network that might play a major role in supporting the Middle Start Initiative's focus on academic excellence, developmental responsiveness, and social equity for the middle grades:

> We also talked about the fact that this network will need to focus on supporting the ongoing development of professionals, both teachers and administrators. It will be important to look at professional development models that are work-based, onsite, and fit into the work lives of professionals. We talked about the possibility of assembling a referent and leadership group to think through with us the issues of constructing a network. A job for the next meeting: Pull together movers and shakers who need to be involved. Bring names, positions, addresses, phone numbers, fax, and e-mail info. *(TA partner's meeting notes)*

The second network also met on a monthly basis. Three of the four schools in the network shared a CSI grant, while the fourth had its own grant, but was from the same region as the other three. This network included staff and administrators. The issues discussed were similar to the network described above: instruction, curriculum, teaming, leadership, implementation, professional development, and strengthening and broadening the network.

In sum, TA partners' work in the schools included mentoring, professional development, problem-solving, and in some cases, intervention in sensitive issues. Because of the high levels of trust and confidence that staff and administrators placed in their leadership, TA partners were able to influence the direction of comprehensive reform efforts in their schools. Some TA partners also facilitated regional networks of schools.

Technical Assistance Partnerships

TA partners also formed their own network that met on an almost monthly basis. These meetings were hosted in turn by partner organizations such as Central Michigan University, and

Detroit Public Schools. In these discussions they debriefed their experiences in schools, described highlights and challenges, brainstormed solutions to current issues, shared their opinions of professional development opportunities their schools had participated in, and in the later stages of Phase I of Middle Start, outlined the critical factors influencing comprehensive school improvement. In the 1997-98 school year, TA partners also played a key role in gathering information from the Michigan Department of Education on the Comprehensive School Reform Design grants ("Obey-Porter"), discussing the implication of these grants to CSI schools, disseminating accurate information about the grant to the schools, and guiding eligible schools in their preparations to apply for grants. For example, TA partners spent some time during their monthly meeting as early as March '98 discussing the implications of the Obey-Porter funds for their schools. The TA partner who maintains the log wrote:

> The MDE will be applying for about $60 million, to underwrite comprehensive school reform to establish lighthouse schools that will demonstrate major differences in student achievement, especially among low-income populations. Since Middle Start schools have focused on comprehensive school improvement, they may be uniquely prepared to move ahead. *(TA partner's meeting notes)*

This TA network also maintained frequent contact with AED and foundation officials. These interactions greatly facilitated management partners' efforts to ground the overall design and management of Middle Start in lessons learned from the schools' experiences, as well as enabled TA partners to connect schools with new research, information, and resources that became available to the initiative.

Schools' Views of Technical Assistance

Staff and administrators were effusive in their praise of the TA partners' contribution to comprehensive school reform and appreciated their work to coordinate reform efforts within schools, as well as facilitate networking among schools. In some cases, TA partners helped schools provide updates of their Middle Start work with school districts. Administrators and teachers used adjectives such as "phenomenal" and "invaluable," to describe the contribution of TA partners to their reform efforts. One administrator in a Group Three school said, "She (the TA partner) is my lifeline." Staff described numerous examples of the ongoing and supportive relationships they shared with TA partners. Administrators were especially appreciative of the

guidance and support they received from their TA partners. A Group Three principal, for example, described the TA partners efforts to clarify the main findings of the School Improvement Self Study to him and his staff:

> She worked tirelessly in helping us focus and plan around these issues. She is a blessing. *(Group Three principal interview)*

A Group One principal was eloquent in his appreciation of the TA partner to his school:

> I am absolutely amazed at the good feelings that we have in this building about our TA partner. Not only me but the rest of the staff look forward to our TA person coming to our building and stopping by classrooms and commenting on instruction, and giving strokes to teachers. I see her as a true friend in terms of her advice and support for the operation of the school. She sits in on meetings with teachers and we are able to get a lot further then I would have pushed for. Principals are lonely people; it's great to have somebody to feed ideas off of. *(Group One principal interview)*

Schools were also very appreciative of the TA partners efforts to conceptualize, manage, and in one case, document regional networks. A principal commented on the hard work invested by a TA partner in running the regional network he belonged to:

> She's been really good in bringing us together and talking about a lot of issues from a leadership perspective. She has helped us focus on how we can sustain our school improvement efforts even after the grant period is completed. *(Group One principal interview)*

In sum, TA partners provided direction to schools and networks of schools. They formed partnerships among themselves, and served as important intermediaries between school personnel and management partners of the initiative. They were greatly appreciated by teachers and administrators, who felt that their Middle Start efforts would have been more tentative without the guidance of their TA partners who played the role of "critical friends."

Chapter Five
Conclusion

Previous chapters of this paper discussed time, expertise, partnership and technical assistance in the 12 CSI schools. This chapter provides a retrospective overview of the ways in which these factors coalesced in a comprehensive, integrated manner in successful Middle Start schools. It also highlights the major challenges faced by schools that experienced less success. In the concluding section, the chapter summarizes the lessons learned in Phase I from the initiative as a whole, as well as the group of 12 CSI schools. The section also lists a range of issues for further consideration, as the initiative enters Phase II.

Retrospective Overview

This section describes four phases of reform activities in CSI schools: the initial steps, involving a focus on "time" issues; a focus on schoolwide participation and comprehensive implementation of the 10 dimensions; refinement of efforts as schools got closer to attaining their Middle Start goals; and some areas of excellence in Group One schools.

Initial steps. The first steps of Middle Start coincided with the first year to year-and-a-half of the CSI program. Most CSI schools began their Middle Start efforts by paying attention to "time." As discussed in chapter one, time, or school reorganization, focused on changes to the schedule that allowed the formation of grade-level teacher teams, learning centers and team houses, common planning time for teacher teams, and block-learning time for students. Schools undertook one or more of the above, integrated them into school improvement plans, assigned staff to implementation tasks in the chosen areas, consulted with technical assistance partners, and gained expertise on specific strategies and practices through participation in professional development. Several schools also undertook extensive professional development in varied aspects of curriculum, instruction and developmental responsiveness.

In many schools, new knowledge and skills were not immediately implemented in the classroom, and in most schools, staff participation was initially limited to a small core group of teachers. Implementation of school reorganization was piecemeal—for example, teaming was implemented in one grade level but not in others, or common planning time was made available

to teachers at the cost of their individual planning time. From the perspective of relative outsiders — such as technical assistance partners and cluster evaluators — initial efforts at reform seemed uncoordinated and overly focused on reorganization in the CSI schools.

In the few schools that began with an instructional/curricular emphasis, a core group of staff translated new knowledge and skills gained from professional development to innovations in classroom practice. However, staff participation remained uneven schoolwide. Schools also struggled with aligning their commitments to Middle Start with school district requirements. District attention to standardized tests frequently created the perception that innovations such as long-term, hands-on projects, alternative forms of assessment, and interdisciplinary instruction were "extras" that could not be fully integrated into routine classroom practice.

Thus, in the early stages of Middle Start, school efforts were characterized by a focus on structural reorganization, limited staff participation, and concepts or practices, that in some cases, appeared to conflict with state or district mandates. Although the 10 dimensions on which Middle Start technical assistance was based stressed comprehensive approaches to reform, technical assistance partners — in their early interactions with schools — customized their assistance according to school readiness and constraints. They played a collaborative role, rather than an overtly directive one, at this stage. In sum, in the first steps of Middle Start, schools made difficult transitions from established ways of functioning to newer approaches to effective middle-grades education.

School-wide participation. Schoolwide participation became the focus of the next stage of Middle Start, as did the use of the School Improvement Self-Study administered by CPRD. The former was made possible by the greater collaboration fostered by teaming, schoolwide opportunities for participation in professional development, and especially the emphasis laid by TA partners on within-school collaboration for school improvement, setting professional development priorities, and interdisciplinary teaming. The use of the School Improvement Self-Study was also facilitated by the TA partner and CPRD. As a result of constraints of time and little familiarity with data analysis, schools sought the assistance of their TA partners in surfacing key areas for attention pointed out in the Self-Study data. TA partners used workshops and retreat formats to help schools develop action plans for professional development, reorganization, climate and other areas.

Networking conferences complemented this assistance by providing schools with additional information and resources from CPRD and the TA partners. The action plans were integrated over time with school improvement plans, leading to greater comprehensiveness and integration in school improvement, as well as greater alignment with school district requirements. Alignment, however, was more difficult to achieve for most schools.

TA partners played key roles in Middle Start during this second stage. They worked closely with administrators and teacher leaders and became the focal point of regional networks of schools as well. However, there were constraints on the role of technical assistance in schools facing frequent changes of leadership (such as administrator/staff turnover, and/or retirement of teacher leaders). A few schools that had made significant progress in the first two years experienced severe setbacks in the next years as a result of change in or retirement of school leaders.

The next steps thus focused on schoolwide participation in gaining expertise, with TA partners playing more directive roles in determining pathways to improvement. During this stage, school improvement became more comprehensive, and there was a growing balance between structural and content-related (curriculum, instruction, and assessment) improvements. Progress on Middle Start dimensions, such as parent and community involvement, program evaluation, and school district relations continued to be incipient in many schools.

Refinement. At least 10 of the 12 Middle Start CSI schools had begun to refine their reform efforts at the time of data collection for this report. By this time, schools had established plans, implementation committees, and some form of self-evaluation (such as within-school reflection, and/or sharing with networks) guiding school improvement. Comprehensiveness (adherence to the 10 dimensions), integration (coordination of the 10 dimensions), and alignment (of dimensions with district requirements) were becoming institutionalized in routine practice. Alignment continued to be difficult, but became a focal agenda item in school improvement for most schools. TA partners, administrators, and teacher leaders of the most successful Middle Start schools made comprehensiveness, integration, and alignment explicit benchmarks for their progress.

In addressing difficulties with one or more such benchmarks, schools found that some answers lay in revisiting and improving innovations implemented in previous stages. Schools

sought further professional development and technical assistance, discussed their difficulties with network partners, and coordinated the efforts of various school improvement committees. School reorganization required ongoing expertise and partnership, as much as expertise required partnership and ongoing improvements to school organization.

Cluster evaluators and technical assistance partners recognized that the Middle Start goals of academic achievement, healthy development, and social equity for students could be achieved only in stages. Hence, student outcomes were not immediately apparent in the earlier stages. Short-term outcomes, such as enhanced teacher collaboration and teacher-student relationships, began to be seen in the later stages of schoolwide participation and refinement. However, it was not until the stages of refinement and achievement that the majority of schools began to achieve all three outcomes for students. The main outcomes for students, as described throughout the paper, were that students were more engaged in their education because of the wider range of curricular, instructional, and assessment opportunities available to them; and students experienced a greater sense of belonging and safety in school and had better relationships with adults in the school.

Group Three schools continued to face difficulties caused by changes in leadership and retirement of key staff. Group One and Group Two schools continued to work on alignment of the MEAP-oriented curriculum and school improvement planning process with their Middle Start work. Several schools also felt the need to increase parent and community involvement in their schools. Toward the end of Phase I, schools increasingly sought the assistance of TA partners in resolving challenges in the areas of leadership, alignment with school district requirements, and parent and community involvement. Cluster evaluators and TA partners, along with other partners of the initiative, recognized the need for greater attention to these areas. This issue is discussed in greater detail in the "Lessons Learned" section of this chapter.

Areas of Excellence. About half the CSI schools demonstrated excellence in some or all aspects of comprehensive, integrated, aligned middle-grades reform, as described by Middle Start. It was not a coincidence that these schools had exceptional leadership, valued their TA partners, and developed powerful collaborations with network partners (and in some cases, community members). In addition to improvements in social and academic outcomes for students, there were staff and administrator outcomes. Some staff from the most successful CSI

schools became professional developers, with a focus on middle-grades reform. Some administrators convinced their school districts to implement middle-grades concepts in other schools with middle grades in their district. In part, Middle Start gained the favorable attention of the Michigan Department of Education through the schools' progress in the above areas.

Lessons Learned

New schools entering Middle Start have a rich variety of successful ways (as demonstrated by Group One CSI schools) to be a Middle Start school. Cluster evaluators and TA partners alike have noted the unique interpretations made by each school of the Middle Start dimensions. The initiative learned from the 12 schools' individual ways of implementing Middle Start at their respective sites. Although guided by the Middle Start framework (the three goals of academic achievement, developmental responsiveness, and social equity, and the 10 dimensions of school improvement), schools interpreted the initiative in several constructive ways. Through their efforts, Middle Start has been shown to be effective in rural, urban and suburban settings; large, medium, and small-sized schools; in schools with varied grade configurations, such as grades K-8, 7-9, and 6-8, as well as in varied school districts. Another significant lesson learned from the schools' experiences was the compatibility of the Middle Start framework with pre-existing reform orientations of schools, such as service-learning, whole language, technology in education, and thematic houses.

In turn, schools were embedded in the initiative in a number of ways. They received grants, worked with Middle Start TA partners, and participated in professional development and networking activities facilitated by the initiative. The initiative, characterized by the collaborative work of the group of partner organizations, showed strong progress and achievements in the areas described below:

- **Responsive grantmaking and design.** The CSI grants enabled the 12 grantee schools in this category to participate in professional development and networking and undertake significant reform efforts in varied areas such as curriculum, instruction, and school reorganization. The grants made to partner organizations for management and coordination, research and evaluation, technical assistance, professional development, networking, and public engagement, helped foster an infrastructure to support the grantee schools' Middle Start work. An early commitment to infrastructure and capacity building enhanced the initiative's ability to build on its strengths over the years. The investment in evaluation and networking enhanced the initiative's ability to stay responsive to its different parts.

- **Effective technical assistance infrastructure.** The partners included a group of six Michigan-based organizations and independent consultants who provided ongoing technical assistance to schools in the areas of middle school concepts and comprehensive reform implementation. TA partners also coordinated regional networks of Middle Start schools and participated in monthly meetings of TA partners and quarterly meetings of the whole group of partners. TA partners played an invaluable role in connecting the work of the partners' group with the change efforts in schools, and vice versa. The increasing institutionalization of technical assistance within the initiative has enhanced the ability of each TA partner to assist his or her school in numerous ways. However, schools have stressed that while they value the expertise of their TA partner, it is the trust built up between the TA partner and the school that enables a school to fully respond to this mentoring role. As the initiative grows, it is important to retain the emphasis on relationships, as much as to build the technical assistance partnership.

- **Growing professional development infrastructure.** The group of partners also included nationally recognized organizations providing research-based professional development in areas such as math, reading, inquiry-based science and technology, service-learning, and parent involvement. At least seven organizations offering varied programs of professional development received Middle Start grants to build a local presence in the state and assist schools in building a comprehensive portfolio of instructional and other expertise. Some of these partners worked directly with Middle Start schools. Others, through their participation in the partners' group, kept the initiative informed of strategies to enhance the expertise of teachers and sustain these enhancements. In turn, professional development partners learned more about the role of technical assistance and school networks within Middle Start and discussed potential ways of collaborating with TA partners in Phase II. The continuing coordination of the work of TA and professional development partners is essential to comprehensive and integrated school improvement. The initiative should retain its focus on helping the two groups of partners build their expertise in related areas, so that they may work together for school improvement in more effective ways.

- **Effective networking strategies.** Networking as a strategy has been used to great effect within Middle Start at three levels. Grantee schools participated in statewide networking meetings and regional networks to share best practices and lessons learned on their middle-grades reform efforts; TA partners formed a network to advance technical assistance within the initiative; and the partners group met on a quarterly basis to collaborate on the ongoing design and implementation of the initiative. Such layered and regular networking activities contributed to dynamic relationships in the initiative. As the initiative seeks to sustain the frameworks and practices it has developed and refined, it must look for ways by which it can sustain existing networks and build more networks for administrators and for teachers. In addition, greater resources need to be allocated to the ongoing documentation of these networks so that the initiative can identify the specific benefits of school participation in networks.

- **Nationally viable design.** Middle Start has forged close ties with the National Forum to Accelerate Middle-Grades Reform through the active participation of some of its partners in the work of the Forum.** The initiative has developed goals and strategies aligned with those recommended by the Forum. In turn, Middle Start has contributed to the advancement of the work of the Forum through sharing its learnings from the ongoing implementation of the initiative. The acceptance of Middle Start as a Comprehensive School Reform Design (CSRD) by the Michigan Department of Education will leverage additional funds (other than those provided by WKKF) for its implementation in a greater number of schools within the state. This, along with the national profile that the project is gaining through the work of the National Forum and the implementation of Middle Start in the Mid South region, will enhance the potential for implementation in other states. In this expansionary phase, Middle Start will need greater resources allocated to research and evaluation in order for such efforts to keep pace with its systemic reform aspects, as well as its impact on student outcomes.

Issues for Further Consideration

Middle Start's first phase provided significant leadership in the state in developing a responsive infrastructure for comprehensive middle-grades reform in the areas of grantmaking; infrastructure-building for technical assistance and professional development; networking; and national support for the Middle Start design. However, despite the supportive operating environment provided to them by their participation in the initiative, schools struggled with principal turnover, aligning new knowledge and skills with district requirements, and involving parents and community members in their reform efforts. School district relations, leadership development, and public engagement are therefore areas the initiative will need to emphasize in Phase II. The following strategies may enable the initiative to address the challenges faced by schools in these three areas.

Relations with state and local educational policies. All CSI schools experienced difficulties with aligning their school improvement plan with their Middle Start work in curriculum and assessment. The initiative should pay more attention to the following in order to help schools overcome these and related issues.

- **The standards movement.** As suggested by recent publications by Anne Wheelock, and Balfanz & Mac Iver, the standards movement is of great relevance to middle- grades reform. Middle Start's ongoing work should include aspects highlighted by the emerging

**The W.K. Kellogg Foundation is one of the funders of the Forum.

standards movement in order for the initiative to succeed on a large scale and over a long period of time, in Michigan and in other parts of the country.

- **State and district educational policies.** The initiative should maximize the opportunities provided by the CSRD program to arrive at ways of coordinating Middle Start's instructional and curricular strategies with those of the state education department and school districts. District officials, TA and professional development partners, school administrators, and teacher leaders should participate in these interactions so that school improvement strategies emerging from these collaborations represent the goals of all groups involved.

- **Emerging strategies.** Some schools and professional development partners have developed strategies to coordinate Middle Start efforts with the requirements of school districts. For example, the Connected Mathematics Project (CMP), which has already been successfully implemented in several CSI schools, has the advantage of being both middle-grades appropriate as well as MEAP-aligned, factors that facilitate its adoption in schools. Middle Start also has an example of school district involvement in the regional network built by two CSI schools that involved the third school with middle grades in their district, encouraging the district to extend Middle Start practices to all middle schools in the city. More attention to examples addressing school district relations developed by schools and partners in Phase I can inform approaches used in these areas on a larger scale in Phase II.

- **In-depth documentation.** Greater attention to documentation of efforts (such as the above) to involve districts and the state department in the initiative will reveal the areas where such relationships can be improved to benefit schools and will suggest issues for policy development in the district and the state.

Leadership development. As demonstrated by the struggles of Group Three schools, changes in leadership (including administrators and teacher leaders) led to serious setbacks in their reform efforts. Leadership is presently nurtured in the initiative by consultations of school leaders with TA partners and their participation in networking activities. According to the recent stakeholder report, at the level of the initiative, public engagement activities among leading educational decision makers has led to greater awareness of middle-grades reform among key stakeholders in the state. The following are suggested as strategies to build on existing leadership development capacity within the initiative:

- **Leadership development through technical assistance, professional development, and networking.** Administrators and teacher leaders require ongoing and structured opportunities to learn about implementing comprehensive, integrated, and aligned approaches to middle-grades reform. Grade-level teacher teams in Middle Start schools are potential sites for leadership development, providing schools with a parallel tier of leadership that will continue improvement efforts, even when there is a change in the administration. TA partners and professional development partners can emphasize leadership development in their work with administrators, teacher leaders, and teacher

teams. The intiative can also promote greater attention to leadership development through its regular networking activities (regional and statewide).

- **Involving teacher education institutions and school districts.** There is also a role for leadership development programs that are a part of teacher education institutions, and are offered by the initiative to school districts. Grantmaking in these areas will enhance efforts to build capacity in leading middle-grades reform efforts in schools, districts, and the state.

- **Statewide leadership for middle-grades reform.** Representatives from schools, partners of the initiative, members of the advisory group, and the public need to be regularly convened in a deliberate way in order for the initiative to advocate for policies and resources that will enable it to sustain and grow.

- **Partnerships with leadership development experts.** In ways similar to systematically involving professional development partners and TA partners, the initiative would also benefit from collaborating with experts in the area of leadership development in education to bolster the initiative's work in this area.

Public engagement and policy development. According to AED's 1997-98 stakeholder report, public awareness in Michigan on issues related to middle-grades reform and early adolescence has increased among key educational decision makers over the last four years. In order to build on this awareness as well as involve other publics, such as community members and parents of middle-grades students, the initiative should consider the following related strategies:

- **School expertise.** Parent and community involvement has continued to be a difficult area of work for some Middle Start schools. The initiative should provide schools with more opportunities to gain expertise in parent and community involvement through ongoing professional development in this area.

- **Key audiences.** The public engagement work will need to begin with the identification of key audiences, such as families of students in, or about to enter, the middle-grades; teacher education institutions offering secondary certification; school district and state department personnel; and advocates for youth.

- **Media strategies.** Through focused media strategies and events, these and other audiences, will have access to information regarding middle-grades educational reform and early adolescence, and of Middle Start's contribution to the same.

- **Greater resources.** The initiative will benefit from allocating greater resources to public engagement, as well as documenting the efforts in this area in a rigorous manner, to record impact as well as to guide appropriate mid-course correction.

- **Position paper on middle-grades education.** Based on lessons learned in Phase I, the initiative should develop a position paper on the implications of Middle Start for state and district policies.

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Signature: Prittha Gopalan	Printed Name/Position/Title: PRITHA GOPALAN PROGRAM OFFICER
Organization/Address: Academy for Educational Development 100 5th Ave. New York, NY 10011	Telephone: 212 367 4596 FAX: 212 627 0407
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